MP McShane Partners

November 2018 Insights

Investment Overview

3Q18 Economic Overview: Harrowing Halloween

After months of dormancy, volatility has reared its ugly head, with many of our previously-articulated concerns manifesting themselves over the past several weeks, resulting in a drawdown of as much as **-9.88%** in the S&P 500® Index from a recent record high on September 20th through October 29th, during which time the CBOE Volatility Index® ("VIX") jumped as much as **+117.31%** to its highest levels since the February 2018 market correction. This recent bout of volatility serves as a reminder that the diversification door swings both ways. It is a nuisance when the market is unilaterally appreciating and a comforting assurance when volatility instigates large declines.

The third quarter 2018 ("3Q18") ended with U.S. equities as the singular asset class outperforming all other asset classes across our diversified investment portfolios. Many investors were becoming increasingly frustrated and disenchanted with diversification's dampening effect on portfolio-level performance, which all too often results in investors giving up on strategic diversification or beginning to believe that this time is different: this expression of investor complacency and overconfidence can be in and of themselves symptomatic of an equity market correction in the making. During the recent correction, diversified investment portfolios exhibited considerable downside protection relative to equity markets. It is during disquieting times like these that clients should appreciate the diversification built into investment portfolios that had previously felt like a nuisance in the face of rising U.S. equity markets enjoying steady, uninterrupted gains with little to no volatility.

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Wealth Advisory Overview

Top Seven Tax Planning Ideas for 2018 & Beyond

As we enter the last two months of 2018, our goal is to help clients implement the most effective tax planning tactics under the new Tax Cuts & Jobs Act. Here are our top seven income tax planning ideas for individuals:

1. **"Bunching" Itemized Deductions into One Year**

   Since the standard deduction is now $24,000 for married couples and $12,000 for individuals, along with the fact that the state and local income tax deduction is capped at $10,000, 2% itemized deductions are no longer deductible, and mortgage interest has higher deductibility restrictions, it may be more beneficial to take the standard deduction rather than itemize your deductions, especially if charitable contributions and medical expenses are low. If your itemized deductions are lower than the standard deduction this year and you like to donate to charity, it may make sense to pre-pay or "bunch" your planned future charitable donations into 2018, thereby increasing your itemized deductions for 2018 and allowing you to take the standard deduction going forward. We recommend

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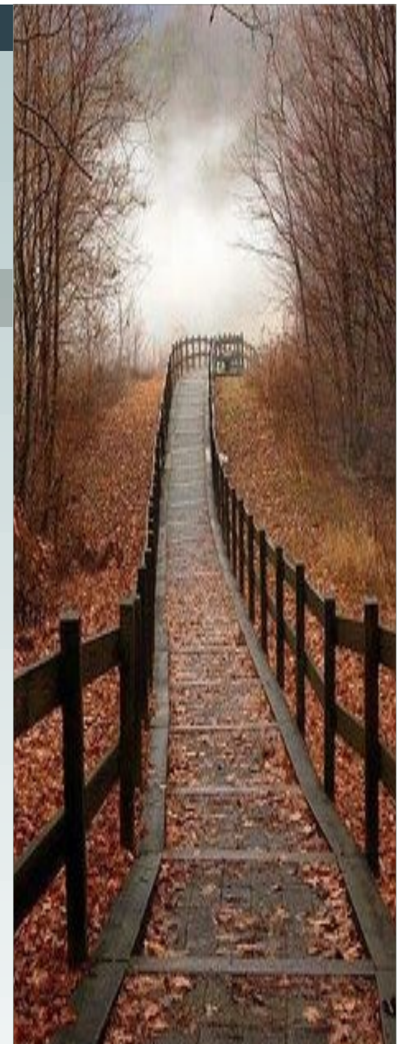

Investment Team

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Chief Investment Officer
Elliott Van Ness, CFA
Director of Research | Portfolio Manager
Thomas Mack
Research Analyst

Wealth Advisory Team

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Director of Tax & Family Office Services
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Wealth Advisor
Michael Means, CPA
Wealth Advisor
Ryan Vaudrin, CFP®
Wealth Associate
Lesley Burke
Client Service Associate

Special Points of Interest

INVESTMENT OVERVIEW

3Q18 ECONOMIC OVERVIEW: HARROWING HALLOWEEN

Below, Chart I provides a diagram of our Balanced Portfolio asset allocation strategy and how the asset class returns contribute to the total return of the aggregate investment portfolio. Mathematically, if the fixed income market - as represented by the Bloomberg Barclays U.S. Aggregate Index - is down **-0.79%**, it becomes extremely difficult to generate sufficient equity-related outperformance to compensate for fixed income (i.e., bond) exposure when the asset class underperforms. Balanced Portfolios - both passive and active - have been temporarily disappointing because U.S. Equity allocations represent *less than* **±40.0%** of portfolio assets and are the only source of relative outperformance. Balanced Portfolio returns are exceeding inflation and outperforming conservative, "lower-risk" asset classes, while understandably lagging equity-only portfolios given the lower allocation of available/investable portfolio assets. That being said, bonds were only down **-0.79%** in October compared to a decline of **-6.84%** for the S&P 500® Index, providing incremental downside protection relative to equities.

Our stock selection has kept up relatively well, despite our sustained overweight in high-quality, dividend-paying stocks that underperformed during the frenzied risk-on environment earlier in the year relative to

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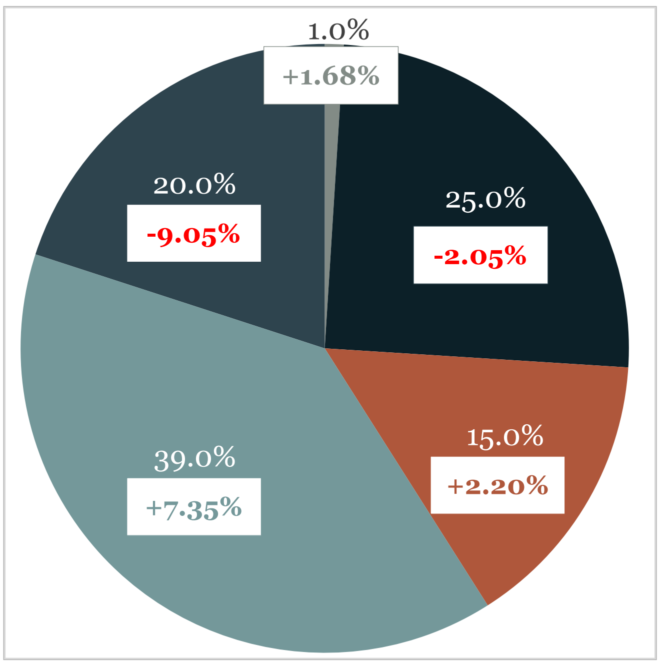
CHART I: BALANCED PORTFOLIO ASSET ALLOCATION & BENCHMARK TOTAL RETURN PERFORMANCE



BALANCED PORTFOLIO ASSET ALLOCATION TARGETS

ASSET CLASS	TARGET WEIGHTS
Cash & Cash Equivalents	1.0%
Fixed Income	25.0%
Hybrids	15.0%
U.S. Equity	39.0%
International Equity	20.0%

ASSET CLASS BENCHMARK PERFORMANCE

DATA AS OF OCTOBER 31ST 2018 USD TOTAL RETURN	TRAILING 12-MO.
ICE BofAML U.S. 3-Mo. Treasury Bill	+1.68%
Bloomberg Barclays U.S. Aggregate Index	**-2.05%**
Hybrids Blended Index	+2.20%
S&P 500® Index	**+7.35%**
Blended International Equity Index	**-9.05%**

Source: McShane Partners, Envestnet|Tamarac®, and FactSet Research Systems, Inc.

MONTHLY INDEX REVIEW
USD TOTAL RETURN

DATA AS OF OCTOBER 31ST 2018	OCTOBER 2018	2018 YTD	2017	2016
S&P 500®	-6.84%	+3.01%	+21.83%	+11.96%
Dow Jones Industrial Average	-4.98%	+3.41%	+28.11%	+16.50%
NASDAQ Composite	**-9.16%**	**+6.71%**	+29.64%	+8.87%
Russell 2000	**-10.86%**	-0.60%	+14.65%	**+21.31%**
MSCI Emerging Markets	-8.70%	**-15.45%**	**+37.75%**	+11.60%
MSCI EAFE	-7.95%	**-8.86%**	+25.62%	+1.51%
Bloomberg Barclays U.S. Aggregate Bond Index	-0.79%	-2.38%	+3.54%	+2.65%

Investment Overview

3Q18 Economic Overview: Harrowing Halloween

low-quality, high-growth stocks. U.S. Equity remains the only asset class exhibiting strong returns and is *only* **±39.0%** of Balanced Portfolios, based on the strategy's long-term target weights. We are overweight this asset class within the tactical parameters mandated in each client's investment policy statement ("IPS"). This diversification and exposure to other asset classes has naturally dampened portfolio-level performance relative to U.S. equities but has also provided relative downside protection during the recent spike in volatility and corresponding market sell-off over the past month. For the month of October 2018, the McShane Partners ("MP") Sample Balanced Portfolio Composite generated a net return of **-4.11%**, while the S&P 500® Index returned **-6.84%**.*

Principles of Portfolio Diversification

Benefits of Portfolio Diversification

As the Investment Team recently highlighted in its September 2018 INSIGHTS monthly newsletter, money market funds ("MMFs") offer investors the opportunity to earn *higher rates of return* (i.e., higher yields/higher interest income) on their cash relative to the return earned on cash held in interest-bearing depository accounts in exchange for assuming incremental/ additional *risks*, including the potential loss of principal. There is an inherent, direct relationship between an investment's expected return and the corresponding risk of that investment. Outsized returns require assuming incremental risk of capital losses, which is one of the fundamental tenets of *modern portfolio theory* ("MPT"), stipulating that an investor can *optimize return* for a given *risk tolerance* through proper diversification, prudent asset allocation, and consistent rebalancing to create discipline around investing, while also managing correlations between portfolio holdings.

Minimizing Drawdowns & Long-Term Total Return Performance

Our investment philosophy is that mitigating drawdowns is *more* beneficial to long-term investment returns than taking unnecessary risks to outperform equity

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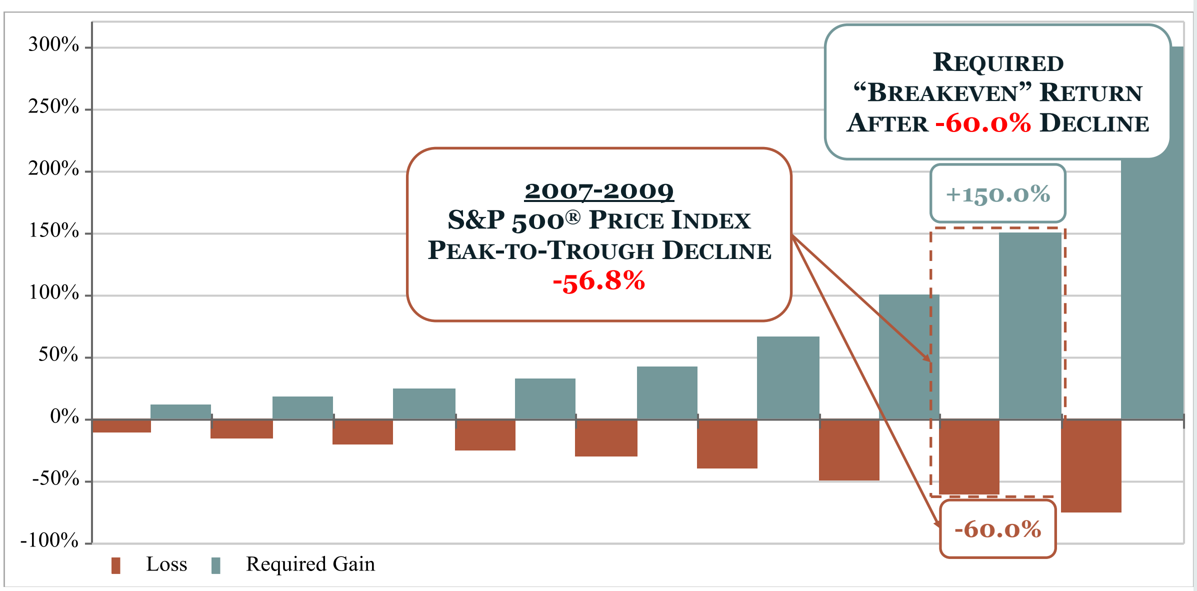
Chart II: Importance of Downside Protection & Minimizing Portfolio Drawdowns



Source: McShane Partners

** Please Refer to Page 7 for Additional Information & Important Disclosures Regarding the MP Sample Balanced Portfolio Composite*

About McShane Partners

McShane Partners is an experienced, boutique registered investment advisor dedicated to independent, comprehensive wealth management. Founded over 30 years ago, the firm, from its inception, has had a singular focus: to provide highly customized investment management and financial planning solutions to clients.

Boutique Firm:

Being a boutique wealth management firm allows us the flexibility to provide more personalized service and offer unique investment solutions to clients in a Fee-Only environment.

Team Approach:

Because each client's situation is different, the team of advisors is hand-selected to ensure areas of expertise are appropriately aligned with the client's specific needs and interests.

Proprietary Investment Research:

The differentiating factor of our portfolio management process is the proprietary investment research driving the portfolio construction. All investment research and analysis is done entirely in-house by our Investment Team.

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3Q18 Economic Overview: Harrowing Halloween

markets during the later stages of the market cycle when equities are overvalued and over-owned. As can be seen in Chart II on the previous page, an investment portfolio with a concentrated, unilateral allocation to U.S. equities would have declined almost **-60.0%** during the last economic recession, requiring a subsequent **+150.0%** gain just to break even (i.e., get back to even). This type of loss often exceeds the scope of most investors' risk tolerance, potentially triggering a liquidation of equity assets at the bottom of the market and the permanent impairment of capital.

Endowment Model as a Proxy for Portfolio Strategies

Most of our clients need/require a combination of capital appreciation and predictable, consistent cash flow and income generation, similar to the investment policies and stated mandates of an endowment. We believe the *endowment model* is analogous to how we responsibly manage client investment portfolios to meet the balanced goal of principal preservation and required, consistent income generation to meet required cash flow mandates: the investment objective of an endowment is to increase the asset value in order to maintain the real purchasing power of the endowment while allowing for regular distributions *(Source: Unitarian Universalist Common Endowment Fund)*.

Across most of our Balanced Portfolios, performance has exceeded our primary benchmarks, except for the S&P 500® Index, as the U.S. equity market has been the singular source of high single-digit performance, returning **±7.35%** over the past 12 months with uncharacteristically absent volatility. Given the intended risk-return objectives across our investment portfolios, our portfolio strategies are performing in-line with major institutional endowments. Below in Chart III, we have provided a sample set of well-known, reputable U.S. endowments that have a long-term track record of delivering consistent returns year after year. By comparing the annualized returns of these U.S. endowments to those of the MP Sample Balanced Portfolio Composite, one can see that the portfolio-level performance of our diversified investment strategy are competitive with industry-level standards and reasonable target return expectations for diversified investment portfolios.

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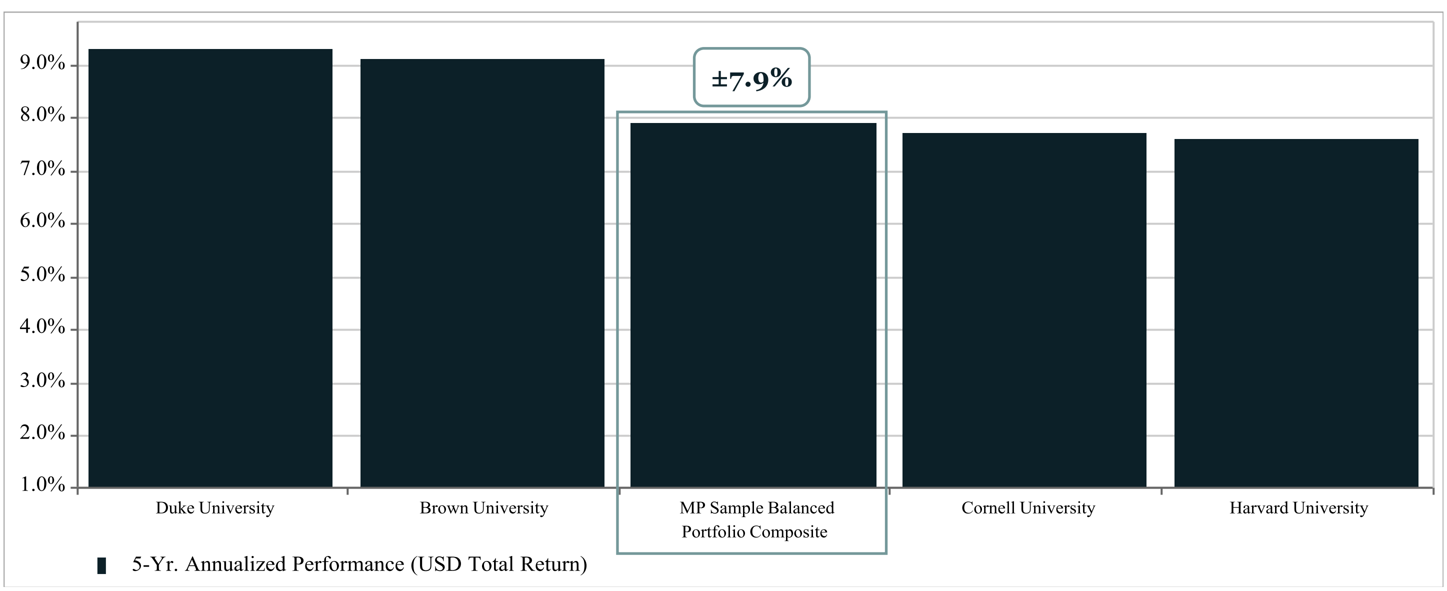
Chart III: McShane Partners Sample Balanced Portfolio Composite Performance*



Source: Annualized Performance as of June 30th 2017 - Global Endowment Management & McShane Partners

* *Please Refer to Page 7 for Additional Information & Important Disclosures Regarding the MP Sample Balanced Portfolio Composite*

Investment Overview

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Passive vs. Active

Below, you can see the sector-level performance of the S&P 500® Index during the recent peak-to-trough drawdown. Notably, the S&P 500® Consumer Staples Sector Index has been a top relative performer at the expense of the S&P 500® Information Technology Sector Index. This sector-level pair trade has benefitted portfolios, as evidenced by the outperformance of the Vanguard Consumer Staples ETF ("VDC"), which returned **+1.70%** for the month of October vs. the aforementioned **-6.84%** decline in the S&P 500® Index. This sector-level pair trade is an example of the relative value provided by actively managing portfolio-level risk exposures during times of heightened equity market uncertainty.

Moreover, the widespread proliferation of the exchanged-traded fund ("ETF") industry and the significant increase in financial assets invested in passively-managed, index-tracking investment vehicles over the past several years may be exacerbating the market sell-offs experienced this past month and earlier this year in early-February. As highlighted in a recent article by The Wall Street Journal ("WSJ"), the exponential growth in equity ETFs' assets under management ("AUM") has considerably increased late-day trading activity (i.e., trading volume) across stock exchanges: portfolio managers responsible for tracking an equity market index have been waiting until the final hour(s) of the trading day to execute trades in order to mitigate potential deviation relative to their portfolio's corresponding index. According to the WSJ, trading volume in the final hour of the trading day as a percentage of daily trading volume on the New York Stock Exchange ("NYSE") increased from **±17.0%** in **2012** to **±26.0%** in **2017** *(Source: WSJ - "Late-Day Trading Activity Continues to Increase").*

As a result, surges in late-day trading volume from passively-managed, index-tracking investment vehicles amplified market declines, as portfolio positions were sold to replicate the corresponding declines across the respective equity market indexes. This should serve as a cautionary tale for individual passive investors' risk-return expectations through the later stages of the market cycle, as volatility has only just begun to normalize

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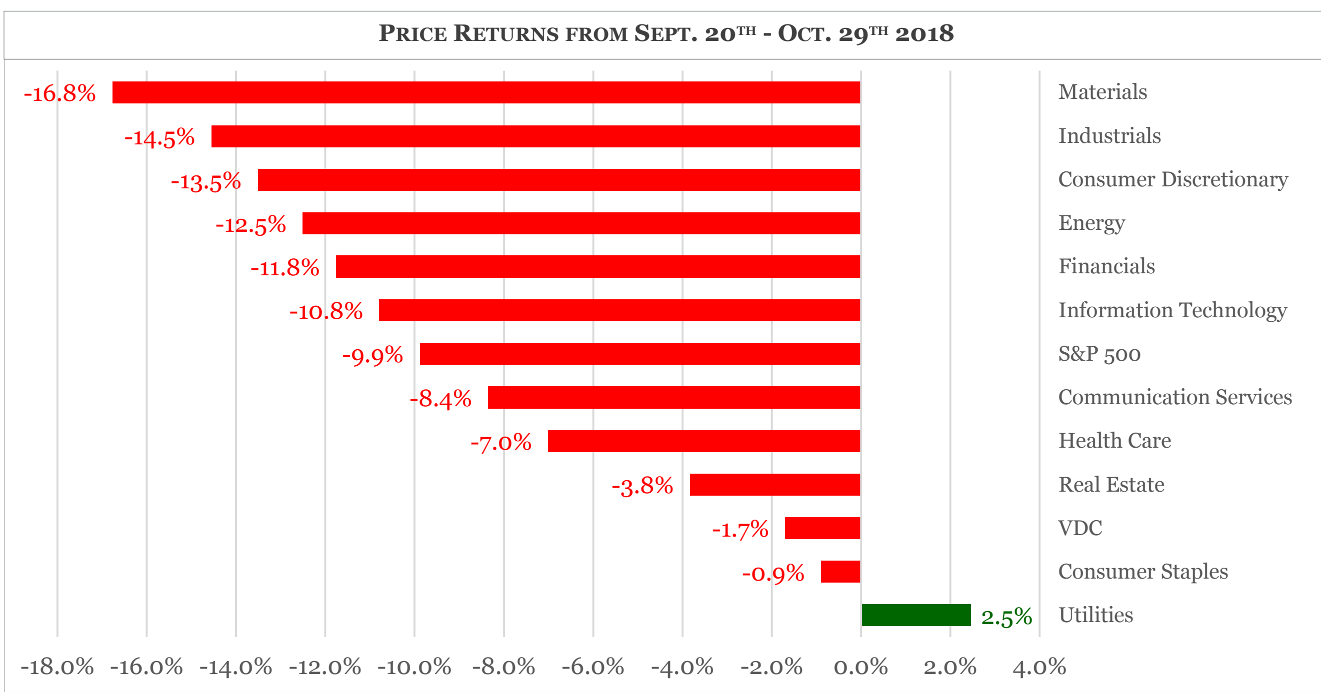
Chart III: S&P 500® Index & Sector-Level Performance - October 2018 "Correction"



Source: McShane Partners & FactSet Research Systems, Inc.

INVESTMENT OVERVIEW

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off of historically low levels, and investors have yet to experience a more substantial, sustained equity market correction or pronounced bear market unprecedented levels of ETF issuance.

MCSHANE PARTNERS THIRD QUARTER 2018 ECONOMIC OVERVIEW WEBINAR

As always, we look forward to discussing these topics, as well as other pressing investment and economic issues, during our Quarterly Economic Overview webinar.

Please feel free to contact us at (980) 585-3390 or via email if you have any questions.

"The four most expensive words in the English language are 'this time it's different'."

- Sir John M. Templeton

THIRD QUARTER 2018 ECONOMIC OVERVIEW WEBINAR

DATE: Friday, November 9th

TIME: 10:00 AM EST

REGISTRATION INFORMATION

Please refer to the following link, which can also be found in the original registration email, or look for additional registration reminders, which will be sent out in the days leading up to the webinar.

To register for the webinar, please click here.

A recording will be available on our website after November 13th.

STOCK & STRATEGY SPOTLIGHT

NAME	TICKER	2018 YTD
Colgate-Palmolive Co.	CL	**-18.87%**

DESCRIPTION & INVESTMENT THESIS

After declining quickly following disappointing 3Q18 earnings results, the Investment Team added Colgate-Palmolive Co. ("CL") to the McShane Partners Core 20 Equity Portfolio ("MP Core 20") model and initiated positions across applicable investment portfolios. Adding CL to the MP Core 20 supports our tactical overweight in Consumer Staples, which the Investment Team initiated earlier in this year based on the sector's excessive discounted valuation relative to historical levels, as well as other *cyclical* sectors in the S&P 500® Index. It is our belief that the company's core portfolio of brands consisting predominately of household names like *Colgate® Toothpaste*, *Palmolive® Dish Soap*, *Irish Spring® Body Wash*, *Tom's of Maine*, *Pine-Sol®* and *Ajax®* cleaning products, as well as a multitude of other names with brand loyalty amongst consumers has considerable value that should *increase* when economic growth begins to slow or when the secular middle class emerging market ("EM") growth story accelerates again. Shares of CL are currently trading at **±19.5x** next twelve months ("NTM") earnings estimates, which is below its historical average price-to-earnings ("PE") NTM multiple of **±22.4x**, representing an attractive entry point for patient investors.

3Q18 ECONOMIC OVERVIEW: VEXING/VENGEFUL VOLATILITY

MCSHANE PARTNERS SAMPLE BALANCED PORTFOLIO COMPOSITE DISCLOSURES

STRATEGY LIMITATIONS The McShane Partners Sample Balanced Portfolio Composite (the "Composite") performance shown reflects the asset-weighted performance of actual performance data and time-weighted returns for a sample set of representative Client Portfolios (the "Portfolios") over the respective time frames according to investment strategies managed by McShane Partners (the "Adviser"). While the performance of the Composite is believed to have been calculated reliably and accurately, the Composite performance data and returns have not been audited, and, as such, the results are subject to limitations inherent in the use of historical performance reporting and returns.

OTHER INFORMATION Past performance is not necessarily indicative of future results. All investments are subject to risk, and investing in accordance with the strategy, like all investments, may lose money. The performance shown is representative of investment strategies and styles used by the Adviser and such style may not be suitable for each potential investor. The Composite is representative of an investment strategy and style used by the Adviser and such style may not be suitable for each potential investor. All material presented is compiled from sources believed to be reliable and current, but accuracy cannot be guaranteed. This is not to be considered as an offer to buy or sell any financial instruments. Additional information regarding policies for calculating and reporting returns is available upon request.

Information provided in this presentation should not be considered or interpreted as advice for your particular financial situation. Please consult a professional advisor for advice regarding your specific financial needs.

McShane Partners maintains strict confidentiality policies and has in place procedural, electronic and physical safeguards to protect your personal, private information.

We collect certain information about you and your financial situation, including names, addresses, social security numbers, assets, income, cash flow and investment objectives. In the course of our service to you, we also track transactions, basis, use of accounts and products preferred. We share client information that is necessary to effect, administer, document or enforce a transaction as you have directed or authorized us to do so. We do not disclose any information with any person or firm for marketing purposes.

This disclosure is made pursuant to the Gramm-Leach-Bliley Act and Regulation S-P (Privacy of Consumer Financial Information), as issued by the Securities and Exchange Commission. It is important to note that the relationship you have with the custodian where your assets are held is independent of that with McShane Partners. Each custodian has its own privacy disclosures and policies, as distributed to clients.

McShane Partners is a Registered Investment Advisor.

Wealth Advisory Overview

Top Seven Tax Planning Ideas for 2018 & Beyond

donating appreciated stock to a donor advised fund to accomplish this goal. Also, it would be wise to pay all outstanding medical bills during 2018 and, if your state and local income tax payments have not yet totaled $10,000 for the year, you may consider making any fourth quarter estimated state income tax payments before December 31st rather than waiting until the January 15th deadline.

2. **Donating Directly from Your IRA to Charity**

   If you are over age 70.5, you can give up to $100,000 directly from your IRA to any qualified public charity, but not a donor advised fund. This is particularly valuable when you plan to take the standard deduction in that the donation does not count as an itemized deduction, but instead it reduces the taxable income from your IRA distribution which is listed on page 1 of your Form 1040. For example: You are married and your required minimum distribution ("RMD") is $100,000. Your only itemized deductions are $10,000 of state and local income taxes and $2,000 of mortgage interest. You would like to make a $10,000 donation to charity. If you transfer your RMD from your IRA to a qualified charity, your taxable income from your IRA distribution is $90,000 and you still get the $24,000 standard deduction. If, instead, you make a charitable donation from your checking account, your taxable IRA distribution would be $100,000 and your itemized deductions would total $22,000. Therefore, you would be paying tax on an additional $10,000 of income and still taking the standard deduction of $24,000.

3. **Use of Donor Advised Funds During High-Income Years**

   If your income fluctuates from year to year, you may consider donating to a donor advised fund ("DAF") in a year that you are in a high tax bracket. For example, if you are in the 37% income tax bracket this year and expect to retire next year, which for instance would drop you down into the 22% bracket, it would be wise to frontload your charitable donations into 2018 via a DAF. A 2018 donation will save you 37 cents on the dollar vs. 22 cents on the dollar in 2019 and you will be able to distribute the funds from your DAF to qualified charitable organizations over a period of years rather than having to decide which specific charities to fund by the end of 2018 .

4. **Use of Roth Conversions during Low-Income Years**

   If your income is low this year due to retirement or business losses, you should consider a Roth IRA conversion while you are in a low tax bracket. Converting to a Roth IRA will allow your money to grow tax-free and you will not be required to take required minimum distributions from your Roth IRA when you turn 70.5. Additionally, your heirs will not pay taxes on inherited Roth IRA distributions as they would with inherited traditional IRA distributions. Please note that the tax reform bill removed the ability to recharacterize any Roth IRA conversions done in 2018 and beyond. So, once you choose to convert your traditional IRA to a Roth IRA, there is no turning back!

5. **The Zero Capital Gains Rate**

   For anyone with 2018 taxable income of $77,400 (married filing jointly) or $38,700 (single), there is no federal tax on capital gains. This is especially pertinent to our retired clients as well as our clients' grown children who may be recent college graduates. Furthermore, if you like to make annual exclusion gifts to your adult children, you should consider donating appreciated stock rather than cash so that they can sell the stock with no capital gain consequences. Note that this does not apply to children who are still dependents as the kiddie tax rules will apply. We monitor all client portfolios to review whether it makes sense to generate gains or harvest losses to keep you under this threshold.

6. **Capital Loss Harvesting**

   We continually review all client portfolios to determine whether there are investments that no longer fit the

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Wealth Advisory Overview

Top Seven Tax Planning Ideas for 2018 & Beyond

intended investment strategy, are not slated for future growth, or can be easily replaced by other investments that fill a similar role within your portfolio. Whenever possible, we realize these losses in order to help alleviate your tax burden, particularly in years where you have realized gains.

7. **Shift Tax-Free Income to Your Children**

   If you have a family business that is not incorporated and owned by you and/or your spouse, you can hire your minor children and pay them reasonable compensation, which can be deducted by the business. A child can earn up to $12,000 with no federal or state income taxes or payroll tax consequences. Additionally, the child would be eligible to make an IRA (Roth or traditional) contribution for up to $5,500. We would recommend a Roth IRA contribution over a traditional IRA contribution since the child would likely be in a zero or minimal tax bracket.

With three CPAs on staff, we are strategically focused on enhancing your after-tax investment returns and we are here to assist you with facilitating your tax preparation, as well as any tax planning questions you may have so please do not hesitate to reach out to us.

Table I: 2017 vs. 2018 Tax Rates & Tax Brackets

Tax Rate	2017	Tax Rate	2018
Filing Head of Household Returns			
10.0%	$0 - $13,350	10.0%	$0 - $13,600
15.0%	$13,351 - $50,800	12.0%	$13,601 - $51,800
25.0%	$50,801 - $131,200	22.0%	$51,801 - $82,500
28.0%	$131,201 - $212,500	24.0%	$82,501 - $157,500
33.0%	$212,501 - $416,700	32.0%	$157,501 - $200,000
35.0%	$416,701 - $444,500	35.0%	$200,001 - $500,000
39.6%	+$444,501	37.0%	+$500,001
Filing Single Returns			
Tax Rate	**2017**	**Tax Rate**	**2018**
10.0%	$0 - $9,325	10.0%	$0 - $9,525
15.0%	$9,326 - $37,950	12.0%	$9,526 - $38,700
25.0%	$37,951 - $91,900	22.0%	$38,701 - $82,500
28.0%	$91,901 - $191,650	24.0%	$82,501 - $157,500
33.0%	$191,651 - $416,700	32.0%	$157,501 - $200,000
35.0%	$416,701 - $418,400	35.0%	$200,001 - $500,000
39.6%	+$418,401	37.0%	+$500,001
Married Individuals Filing Joint Returns			
Tax Rate	**2017**	**Tax Rate**	**2018**
10.0%	$0 - $18,650	10.0%	$0 - $19,050
15.0%	$18,651 - $75,900	12.0%	$19,051 - $77,400
25.0%	$75,901 - $153,100	22.0%	$77,401 - $165,000
28.0%	$153,101 - $233,350	24.0%	$165,001 - $315,000
33.0%	$233,351 - $416,700	32.0%	$315,001 - $400,000
35.0%	$416,701 - $470,700	35.0%	$400,001 - $600,000
39.6%	+$470,701	37.0%	+$600,001

Around McShane Partners

Mint Museum Auxiliary Fall Membership Meeting

McShane Partners is proud to once again sponsor the Mint Museum Auxiliary. Organized in 1956, the Auxiliary supports The Mint Museum by raising money to support educational offerings for the community and fund acquisitions for the Museum's permanent collection. Daniele Donahoe introduced Cathy Graham at the Fall Membership meeting for the Mint Auxiliary. Cathy Graham is an award winning artist and fashion illustrator.

Light the Night

At Light the Night, it is their aim to bring light to the darkness of cancer through research and cures. Light The Night is a series of fundraising campaigns benefiting The Leukemia & Lymphoma Society's ("LLS)" funding of research to find blood cancer cures. Partner, Leah Maybry, was asked to do the Executive Challenge to raise money for the Leukemia & Lymphoma Society's Light the Night Walk, which will be held on November 10th. She is teaming up with her good friend Wendy Teal, who was diagnosed with lymphoma in 2015, and her goal is to raise $50K.

To learn more about this amazing charity or support this great cause, please visit Leah's page.

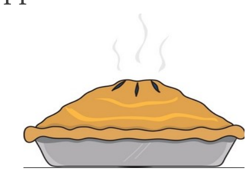
Belle's Journey

Leah Maybry attended Rob Bierregaard's author event at Park Road Book Store on October 19th. Rob was in town for a book tour for his first novel, *Belle's Journey*.

Rob has been studying Ospreys in southern New England since 1971. Back in 2013, while waiting for a young Osprey to reappear at its nest, a friend suggested to him that he write a book about his favorite Osprey. It didn't take long for the seed of an idea to germinate, and about 5 months later, more or less to his own surprise, he had written a book.

Belle's Journey tells the tale of a young Osprey Rob tagged at her nest on Martha's Vineyard in 2013. The travels of "Story Belle" to Brazil and back is a composite of four different young Ospreys from Martha's Vineyard, but most of the story is based on "Real Belle", and everything that happens in the book happened to one of their satellite-tagged birds.

Come By, Say Hi, Grab a Pie!



On Wednesday November 21st, McShane Partners will be hosting our fifth annual "Come By, Say Hi, Grab a Pie" throughout the day at our offices! Please email Lesley Burke as soon as possible to reserve your pie, and we will have one waiting for you as a thank you for allowing us to serve your wealth and investment advisory needs!

LifeLock® Identity theft Protection

If you are a client of McShane Partners and are interested in registering for LifeLock®, you are eligible to receive 20% off LifeLock's® award-winning identity theft protection, which will monitor your personal information and alert you of potential threats.

For more information, please visit: https://tamaracinc.com/lifelock

McShane Partners

Wealth management is our only business; therefore, our attention is undivided and our intentions are transparent.

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